FocusOn®:

College Funding

IMAGE LIST

0010 Welcome

0020 Our Commitment

0030 Workbook and Evaluation Form

0040 **Three Steps to College Funding: Estimate the Cost**

0050 The Importance of Acting Now

0060 Current Cost of a College Education

0070 Future Annual Cost of College

0080 Factor in Your Timeline

0090 Calculate the Cost

0100 What Is Your Savings Goal?

0110 How Will You Pay for College?

0120 **Three Steps to College Funding: Establish a College Fund**

0130 How the Typical Family Saves for College

0140 Taxable vs. Tax-Free Savings Options

0150 College Savings Options

0160 529 Plans

0170 529 College Savings Plans

0180 Other Advantages of 529 Plans

0190 Coverdell Education Savings Account

0200 Roth IRA

0210 Taxable Accounts

0220 Stocks, Bonds, Mutual Funds, ETFs

0230 Investing Considerations

0240 Sample Asset Allocation Model: Aggressive Allocation

0250 Sample Asset Allocation Model: Conservative Allocation

0260 Making a Consistent Commitment

0270 Setting a College Savings Goal

0280 Saving for College *and* Retirement

0290 **Three Steps to College Funding: Evaluate Other Funding Sources**

0300 How the Typical Family Pays for College

0310 Financial Aid

0320 Grants and Scholarships

0330 How Is Financial Need Determined?

0340 Applying for Financial Aid

0350 Assets Not Counted for Federal Aid Purposes

0360 Loans

0370 The Burden of Student Debt

0380 Additional Funding Sources

0390 Retirement Plans

0400 Home Equity

0410 Gift from Grandparents

0420 Education Tax Credits

0430 Countdown to College

0440 Putting Your Knowledge to Work

0450 Evaluation Form

0460 Thank You

© 2020 Broadridge Investor Communication Solutions, Inc.